Pivot Tables in Microsoft Excel 2007

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Objectives

- To create pivot tables
- To filter data in pivot tables
- To format data in pivot tables
- To improve appearance of pivot tables
- To create pivot charts
Pivot Tables

- PivotTable reports can help to analyze numerical data.
- With PivotTable reports, you can look at the same information in different ways with just a few mouse clicks.
- Data swings into place, answering questions, telling you what the data means.
How to Create a Pivot Table

1. Open your spreadsheet and remove any blank rows or columns.
2. Make sure each column has a heading, as it will be carried over to the Field List.
3. Make sure your cells are properly formatted for their data type.
4. Highlight your data range (at A1 shift+Ctrl+End)
5. Click the Insert tab.
6. Select the PivotTable button from the Tables group.
7. Select PivotTable from the list.
How to Create a Pivot Table cont...

8. Double-check your Table/Range: value.
9. Select the radio button for New Worksheet.
10. Click OK.

A new worksheet opens with a blank pivot table. You’ll see that the fields from our source spreadsheet were carried over to the PivotTable Field List.

11. Drag an item such as Month from the PivotTable Field List down to the Row Labels quadrant.

The left side of your Excel spreadsheet should show a row for each Month value.

12. The next step is to ask what you would like to know about each month. Drag the salesman field from the PivotTable Field List to the Column Labels quadrant.

This will provide an additional column for each salesman. Note that you won’t see any numerical data.
How to Create a Pivot Table cont...

- To see the total sales for each salesman drag the Net Sales field to the **Values quadrant**.
- In this case, Excel determines I want a Sum of Net Sales.
- Double-click the entry and choose another Field Setting e.g. Average.
- Move the fields to the Row labels and Column labels quadrants to view different views of the report.
How to Filter Data in Pivot Tables

- Move the field you want to filter by to the **Report Filter**. e.g. Country
- The filter is placed above the table. Click on the dropdown arrow to filter the table.
- Click the **Select Multiple Items** check box.
- Select the country/countries to view results
How to Create a Group Summary

- Double Click on the data in the pivot table.
- E.g. double click on sum of Net Sales for Jane for the year 2009
- This creates a new worksheet with the details.
How to Format Data in Pivot Tables

- Highlight the data to format
- Right click
- Select format cells or use the quick format buttons e.g. (,) for thousand separator, font color and size

To sort the data:
- Highlight the data
  - Click on options tab->Sort group
  - Select the A->Z or Z->A quick sort
  - For Advanced sorting Click on AZ ZA sort button
How to Improve Appearance of Pivot Tables

- To change the titles Column labels and Row labels
  - Click inside the table
  - Select Design tab->Layout group->Report Layout->Show in outline form

- To show/hide subtotals
  - Click inside the table
  - Select Design tab->Layout group>Subtotals> Do not Show sub totals (or select show all subtotals at top or bottom of group)

- To change the style of the table
  - Click inside the table
  - Select Design tab->PivotTable Styles group->Select the style
How To Create Pivot Charts

• Click on the data in the pivot table
  ◦ Select the Options tab->Tools group-> Pivot Chart

• You can filter the chart as required.
  ◦ Note: This filters the pivot table too

• To refresh data on the pivot table and chart
  ◦ Click on the pivot table
  ◦ Select the Options tab->Data group->Refresh
How to Get Microsoft Excel

- It is part of the Microsoft Office Suite
- It has to be purchased

Getting help

- Search online
  - www.google.com
  - Type Pivot Table Tutorial — gives helpful links or any question you may

- There is a help button at the top right corner of the Microsoft excel window
  - Click on it
  - Type in the question